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ABSTRACT

This brochure highlights themes of a meeting held November 7, 1996 in Columbus, Ohio. The meeting was cosponsored by the National Alliance of Business, the Business Coalition for Education Reform, the Ohio Business Roundtable, the Ohio Chamber of Commerce, and the Ohio Manufacturers' Association. Its purpose was to underscore how business partners can deploy practical, rigorous, and tested organizational improvement strategies to support local education reform initiatives. It highlighted the use of customer satisfaction surveys and an integrated management system to improve student and system performance. The management system is based on the criteria used by the National Institute of Standards for its Malcolm Baldrige National Quality Award, a customer-focused, data-driven blueprint to attain positive business results. This brochure provides business leaders and coalitions with information and resources they can use to support academic achievement in their own communities. Quality assessments based on the Baldrige criteria provide a solid foundation for exercising leadership, distinguishing between policy making and implementation, and focusing all critical decisions and activities on improving student achievement. In education reform, standards provide the destination, and quality assessments offer the road map. Partnerships between business and education leaders will accelerate the journey. (SLD)

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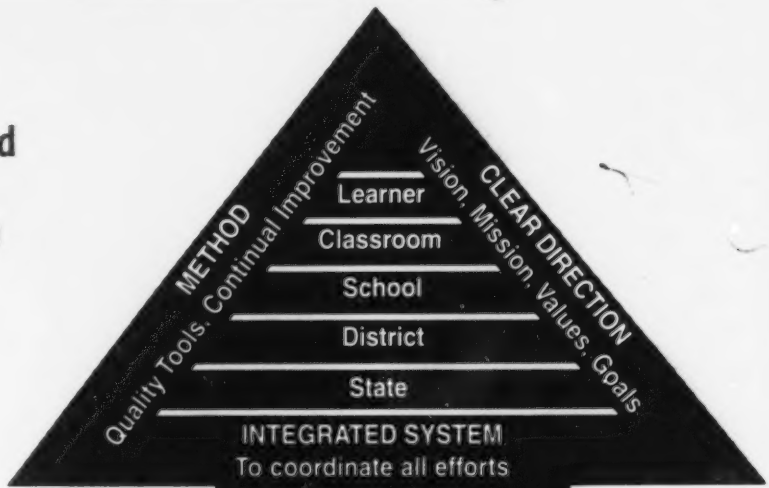
Quality

How Educators and Business Can Take Action Together



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This brochure highlights the themes of a meeting which took place on November 7, 1996 in Columbus, Ohio. *Implementing a Customer-Focused, Quality-Driven Education Improvement Strategy: How Business Partners Can Support their Communities* was co-sponsored by the National Alliance of Business, the Business Coalition for Education Reform, the Ohio Business Roundtable, the Ohio Chamber of Commerce and the Ohio Manufacturers' Association. The purpose of the meeting was to underscore how business partners can deploy practical, rigorous, and tested organizational improvement strategies to support local education reform initiatives. It highlighted the use of customer satisfaction surveys and a Baldrige-based integrated management system to improve student and system performance.

As part of the "Successful Strategies" series, this BCER brochure provides business leaders and coalitions with information and resources they can use to support academic achievement in their own communities. For more information about the "Successful Strategies" series or to inquire about additional BCER resources, please contact Aimee R. Guidera (202/289-2901) or Karen Larson (202/289-2903) at the National Alliance of Business.

This brochure was adapted from several resources (all of which are listed in the resource/materials section), including: an article written by Peggy Siegel, Director of Business/Education Management Initiatives at the National Alliance of Business; materials on *CSMpact* by The Gordon S. Black Corporation; and materials by Jim Shipley, Executive Director of the Quality Academy in Pinellas County, Florida.

Why Education Needs Quality Assessments

Now what?" asked an exasperated Jim Smith, CEO of Success, Inc. "Over the last seven years, we've donated computers, provided mentors, and participated in school-to-work programs and on school teams. My people are active in state policy debates. We've done a lot, but the overall results don't measure up. What's the problem, Mary? Even more importantly, what can we do about it?"

Mary Jones, Superintendent of Any School District, smiled and nodded. "Jim, I know that you're personally committed to improving education, so I'll be candid. Everything in education is so crisis driven and fragmented. Even where there are improvements, I'm hard-pressed to identify specific reasons for our success or apply lessons learned to other settings."

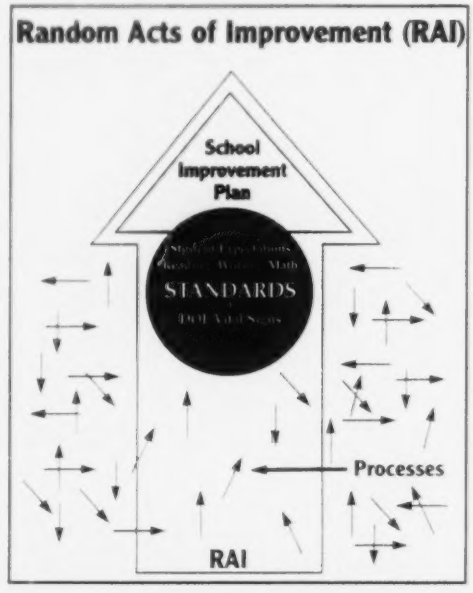
"A lot of people want to help," continued Mary, "and that's good. Educators know that we can't make change happen by ourselves, but here's our dilemma: the individual acts of good will don't form a critical mass. What we need are successful improvement strategies and the staying power to see them through."

Sound familiar? This same conversation could be held in almost any community across America. Business and education leaders have demonstrated their commitment to help students succeed through numerous partnership activities. Many of these programs look good, feel good, and **are** good. But absent a road map to align reform, they continue to run on separate tracks.

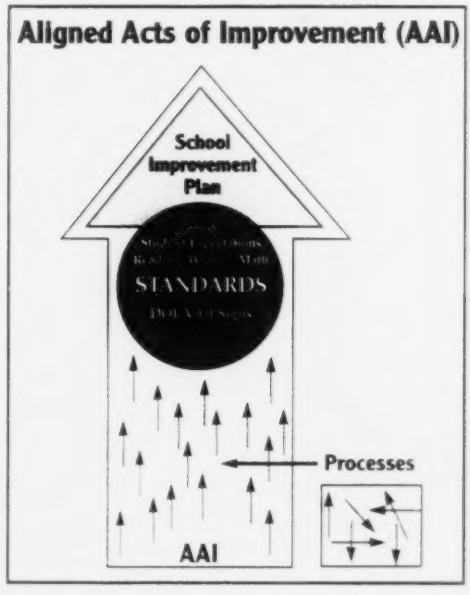
The Price of a Fragmented Education System

Currently, education displays the rhetoric but not the infrastructure to implement systemic reform. Successful practices usually are confined to single settings, dependent on the tenacity of individual leaders. Once these leaders burn out or move on, their reforms frequently languish and disappear.

The problem extends beyond individuals. It has become institutionalized. Entangled in a complex web of policies and regulations, separate programs, and ad hoc solutions, educators are captives of the existing organizational structure. Faced with the choice between complying and leading, many educators default to the path of least resistance — meeting myriad, disconnected requirements — not because they want to, but because they have to. Unfortunately, the path of least resistance too often becomes the path of least impact.



We can do better. Building on what works, ***we can create a new leadership infrastructure in education, one that has the organizational capacity to make continuous improvements.*** The challenge is to merge what educators *have to do* to meet local, state, regional, and federal policy directives and regulations with what educators *want/need to do* to improve education.



A Course of Action:

Align Standards and Quality

As a nation, we've reached remarkable consensus over an education reform agenda. President Clinton called for standards and assessments in his 1997 State of the Union message. The Business Roundtable, National Alliance of Business, and U.S. Chamber of Commerce endorsed a common agenda — standards, assessment, and accountability. *Achieve*, created by the governors and key business leaders following last year's National Summit on Education, champions the same issues. Increasing numbers of educators and professional education associations are also on board. This is a proactive education statement for the country and long overdue.

Raising standards, assessing progress, and accepting accountability are necessary ingredients in the alchemy to improve student performance. They provide the "whats" of the system by defining the substance and business of learning. What they don't offer are the "hows" to implement improvement. Therefore, we also need to work on the *organizational capacity* of the education system to improve learning.

Increasing numbers of districts are using the principles of total quality management as a framework for examining their administrative structure and processes. Quality stresses continuous improvement of organizational processes, resulting in the delivery of high-quality educational services. Quality assessments based on the Malcolm Baldrige National Quality Award Criteria (see accompanying sidebar for more information) provide a solid foundation for exercising leadership, distinguishing between policy making and implementation, and focusing all critical decisions and activities on improving student achievement.

In a continuous improvement context, the reform agenda of standards, assessment, and accountability has a viable way to take hold. The graphic below illustrates the value of aligning management processes with standards-based education reforms.

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ACTION PROFILE:

Using the Baldrige Criteria to Improve Education Performance

Just how good are our schools and how do we know? Are there valid criteria and an assessment process for making legitimate comparisons? Specifically, how can any school district compare itself to other school districts or other well-managed organizations so it can continuously improve?

The need to measure the quality of our schools is essential. Taxpayers need to know that they are receiving value for their tax dollar. Businesses need to know the competency of the available workforce, and the community needs to know that the students exiting schools can become contributing members of society.

Assessing the quality of our public schools historically has been very subjective. This challenge is similar to the one faced by the National Institute of Standards and Technology (NIST) in the mid 1980s when it sought to prompt improvement in the quality of large and small manufacturing and service companies. In response, NIST created the Malcolm Baldrige National Quality Award.

Grounded in ten years of private sector experience, the Baldrige Award is a customer-focused, data-driven blueprint to attain positive business results. The Baldrige criteria and assessment process have direct applications to education. The criteria are organization-neutral; their benefit to private and public entities alike is that they serve as a diagnostic tool for any organization to improve its performance. They evaluate the quality of an organization by assessing the relationships among the categories (see diagram on preceding page.)

As they develop and implement standards, growing numbers of state and local leaders are already gravitating to the Baldrige Criteria as their organizational performance assessment. Several regional accrediting associations, for example, now use Baldrige as an alternative measure of organizational performance or are revising their own criteria to become more performance-driven.

Innovative school districts are also measuring themselves against the *same* Baldrige-based quality standards as business and succeeding. Pittsford Central Schools, a suburban district outside of Rochester is a New York Excelsior (Quality) Award winner. Reflective of the district's success, the American Association of School Administrators recently selected Pittsford's John O'Rourke as Superintendent of the

Year. Pinellas County Schools (see sidebar #3 for more information on Pinellas' efforts) won the Governor's Sterling (Quality) Award in Florida. The 22nd largest district in the country, Pinellas bases its integrated management system on Baldrige. Florida sparked the initiative by requiring school improvement teams to submit annual plans demonstrating how they are meeting state standards, but not telling them how they must do it.

Winning their state quality awards confers well-deserved public recognition on districts like Pittsford and Pinellas. The real award, however, comes from having a framework for exercising self-determination and a built-in strategy, including the capacity to benchmark world class processes from all types of organizations, that sustains the momentum for making improvements.

Other sites could use Baldrige in a similar fashion. More than 40 states now have quality award programs that promote and recognize organizational performance. Their existence gives Baldrige and state quality examiners, whose ranks include growing numbers of educators, a way to share their expertise in states and communities. It also offers policymakers and researchers a rigorous way to compare, disseminate, and reinforce improvement efforts across school, district, and state boundaries.

The U.S. Secretary of Commerce, after notifying Congress, may extend the Baldrige Award to education and healthcare organizations. The Baldrige Foundation is committed to raising $15 million to support the extension, contingent on Congressional approval of the President's 1998 federal budget request. By supporting the appropriation, Congress can bring a commanding resource — as well as millions of private sector dollars — to the foreground of education reform.

Baldrige is, in fact, this country's best kept secret of a successful public/private partnership. For every $3 in tax dollars, the program leverages an estimated $97 in private sector funds and in-kind support. The time and resources donated to Baldrige support activities such as training examiners, disseminating and upgrading the Criteria, sponsoring site visits to the best applicants and feedback reports to all applicants, and general sharing of best practices. Applied locally, a Baldrige *improvement process* can target these same resources on behalf of education.

Within such a context:

- "Standards" become an *amalgamation of customer requirements,* rather than competing expressions of subject area priorities for educators to squeeze in during the school day. Content standards articulate what states, communities, employers, parents, academia, and students themselves agree they need to know and be able to do. Performance standards are stretch goals, captured in short-term strategies and long-term plans used by schools to raise student achievement.

- "Assessments" become *templates of organizational performance,* encompassing but extending beyond key indicators of student performance. They link the work people do with definable, measurable management processes tied to specific outcomes. They then provide a direct connection between those processes and the results that organizations achieve.

- "Accountability" becomes the means by which organizations define for individuals and teams their *responsibilities in meeting customer requirements.* Included in the definition are actions top leaders take to fulfill their responsibility for making improvements — articulating specific expectations in meeting customer requirements and then providing employees with resources and removing barriers so they will succeed.

Accountability exercised this way is a far cry from its current application in education. Today, being held accountable too often means getting flogged publicly for poor results over which one has little or no control. Or the reverse — everyone is held accountable in theory, yet no one takes responsibility for change — so failure with students remains a tolerable option.

No doubt, standards will raise the performance bar in education. Without addressing organizational capacity as well, we risk another round of unsuccessful reforms and public floggings. Quality assessments provide students, educators, and communities with innovative strategies and supports needed to jump over the bar.

ACTION PROFILE:

Measuring Customer Satisfaction in Education: A Starting Point to Improve Performance

Measurement is an essential component of any school improvement system. Reliable information can ensure both that customers drive quality and that educators focus on issues that will make a difference. A key quality principle: "If you do not measure it, you will not change it!"

There are two separate, interrelated approaches to quality measurement. The first is the manufacturing approach. With the manufacturing approach, the central issue is to reduce the failure rate of products. Motorola, for example, established a defect rate goal of Six Sigma, or 3.4 or fewer failures per million. Motorola's improvement in quality was one of the reasons for its success in winning the Malcolm Baldrige National Quality Award. A key to Motorola's success has been objective measurement: The company set out to measure defect rates for every aspect of its operation, from production to finance to marketing.

The second measurement approach is provided by the Xerox experience. Xerox chose to focus most heavily on documenting the satisfaction of customers, both external and internal. For Xerox, the objective was total customer satisfaction.

The two approaches are not exclusive. Motorola and Xerox employ both types of measurement. These approaches have a great deal to contribute to public education. In the field of education, the equivalent of the Motorola "defect rate" is to measure and document such things as dropout rates, failure rates, performance on various tests, and the number of graduates with advanced achievement. There are strategies of measurement available for these variables, and although they may not be perfect, there is a wealth of this type of performance data available on the public schools.

The educational equivalent of the Xerox approach to total customer satisfaction is to examine the reactions of those who receive services provided by the school systems. In this instance, the measurement of quality would include such elements as student experiences and satisfaction; parent experience and satisfaction; and employee (teacher/staff) experi-

ences and satisfaction. Public education is one of the very few service industries today that does not monitor the way in which its services are received by its customers. Yet, without such monitoring, an entire dimension of the quality movement cannot be applied to public education.

The Gordon S. Black Corporation (GSBC), a recognized industry leader in customer satisfaction measurement and quality enhancement, has developed a tool to aid the measurement of customer satisfaction in school districts. *CSMpact For Schools* is designed to provide measurement of the service delivery components of education as they are experienced by the customers of the services provided by school systems. *CSMpact* focuses on the manner in which students, teachers, staff, and parents experience services provided by the district. They experience service delivery through well-defined events, circumstances, and conditions. *CSMpact* allows the various stakeholders to assess the quality of the delivery of these educational services.

Performance in service delivery and student, teacher, and parent performance are linked in a system of reciprocal causality. Research demonstrates that satisfied stakeholders perform better — whether students, parents, or faculty. Conversely, people who can be induced to perform better also become more satisfied. Finally, the improvement in the satisfaction of any stakeholder group results in higher satisfaction among the other stakeholder groups.

For more information on CSMpact and the Gordon S. Black Corporation, please see the resource section.

The Business Role

Reform efforts in education have taught us an important lesson. Solutions, no matter how well-intentioned, cannot be imposed top down. They need to be home-grown, from the classroom up. Fortunately, many educators, fortified by educational research and business expertise, are eager to implement their own solutions.

Business should be heartened by the emerging improvement opportunities in education. Successful companies that have gained expertise by confronting their own pain of constant change now have a way to share their wisdom. Starting with a clear articulation of workforce requirements for new employees, business partners can advise and reinforce educators in implementing higher academic standards. Just as compelling, they can share a critical resource that many companies take for granted: the capacity to design management systems that transform organizational performance.

Business and education leaders need to become tenaciously single-minded in their collaboration. To succeed, the new education leadership infrastructure they create must focus on raising achievement and expanding lifelong learning opportunities for and with all students.

Standards provide the destination. Quality assessments offer the road map. Partnering will accelerate the journey.

ACTION PROFILE:

Creating an Integrated Management System: Pinellas County's Quality Academy

In 1991, Pinellas County Schools (PCS) adopted a quality management philosophy in response to Florida's Blueprint 2000 education reforms. The goal was to transform the school district into a high-performing, learning organization by using quality principles.

Working closely with its key education partner, AT&T Paradyne, the PCS planning team adopted the Baldrige Criteria as its integrated system of quality improvement for schools, departments, and the district. Jim Shipley, Executive Director of the Quality Academy and a Florida Governor's Sterling Award Senior Examiner and Malcolm Baldrige Senior Examiner, oversaw the task of modifying the Baldrige Criteria. The "Superintendents Quality Challenge" engaged Pinellas County schools and departments in building a quality system.

The Quality Academy is the driving force in the PCS ambitious systemic and community-wide school improvement initiative. Its mission is to transform the district into student-centered, collaboratively managed, high-performing schools, whose intrinsically motivated students meet and exceed the 21st century standards for academic achievement and excellence. Three strategies serve this overarching purpose:

1. Create a district infrastructure to meet Blueprint 2000 goals, standards, and outcomes;
2. Transform the district into a learning organization by aligning systems to support continual improvement; and
3. Foster community partnerships and improved supplier quality.

PCS believes that the greatest gains will come from the ability of its 107,000 students to apply quality principles in improving teaching and learning processes. To meet these goals, the district is engaging its entire workforce to focus on community requirements, adopt a set of beliefs around effective practices, develop the skills to apply those beliefs, align systems, and continually improve their efforts and results. To accomplish this ambitious set of tasks, a vastly increased capacity for training, self-study, data collection, planning, analysis, and research-based action is required.

Resources

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Materials

1997 Baldrige *Criteria for Performance Excellence.* For more information, contact the Baldrige Office, National Institute of Standards and Technology at 301/975-2036; fax: 301/948-3716.

CSMpact Information Kit. Gordon S. Black Corporation, 716/272-8400 ext. 400.

The Cutting Education of Common Sense: Total Quality, Education and Systemic Change. (Executive Summary of *Using Quality to Redesign School Systems*) Available by contacting the National Alliance of Business: 800/787-2848 or fax orders to 301/206-9789 or order through NAB homepage at www.nab.com.

Going to Scale with TQM: The Pinellas County Schools' Journey Toward Quality: How to Use the Malcolm Baldrige Framework and the Superintendent's Quality Challenge to Lead Continual School Improvement. by Jim Shipley and Chris Collins. Published by SERVE (SouthEastern Regional Vision for Education). For further information, contact Quality Academy; P.O. Box 2942; Largo, FL 34649-2942; 813/588-6295.

Using Quality to Redesign School Systems: The Cutting Edge of Common Sense. By Peggy Siegel and Sandra Byrne. Published by Jossey-Bass. Available by contacting the National Alliance of Business: 800/787-2848 or fax orders to 301/206-9789 or order through NAB homepage at www.nab.com.

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